



10 Step Service BDC Best Practices

- 1. Proper Phone Greeting:** Always introduce the name of the dealership, name of the agent. The greeting should make the caller feel welcome.
- 2. Gather Information:** Ask for the caller name, phone number & email.
- 3. Vehicle Information:** Ask for the year, make, model, mileage.
- 4. Vehicle History:** Review the last time the vehicle was serviced and where it was serviced.
- 5. Review Vehicle Issue:** Customer to explain what problems the vehicle is having.
- 6. Review Recommended Services:** Inform customer of recommended services based on history and mileage according to scheduling system.
- 7. Set Appointment:** 1 Hour or less will be a waiting. 1 hour or longer is drop off. Offer three options of available times. Confirm appointment the day before.
- 8. Follow Up After Service:** 2-3 days after RO completed call customer to see how their visit went.
- 9. Management Accountability / Communication:** As sometimes customers will have a complaint it is important to communicate to management in real time. This can be done through instant messages and texts.
- 10. Maintain a log of communication** to ensure that every customer was properly followed up with. We recommend using Google Docs.